



Office of Travel and Tourism Industries

2009 Sector Profile: Rental Car



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Overseas Visitors Using Rental Cars

[thousands of visitors]	2002	2003	2004	2005	2006	2007	2008	2009	Change 2009/2002
Overseas Visitors ⁽¹⁾	5,984	5,588	6,198	6,547	6,284	6,785	7,602	6,913	929
% Change	-3	-7	11	6	-4	8	12	-9	16
Share of Overseas Visitors	31.3	31.0	30.5	30.2	29.0	28.4	30.0	29.1	-7.0
Point Change in Share	-2.7	-0.3	-0.5	-0.3	-1.2	-0.6	1.6	-0.9	-2.2

Country of Origin of Visitors Using Rental Cars

Visitor Origin	Market Share 2008 (Percent)	Volume 2008 (000)	Market Share 2009 (Percent)	Volume 2009 (000)
WORLD REGIONS				
Europe	58.0	4,409	54.2	3,747
Western Europe	56.9	4,326	53.0	3,664
Asia	21.9	1,665	20.9	1,445
South America	10.0	760	14.5	1,002
COUNTRIES OF RESIDENCE				
United Kingdom	23.3	1,771	19.7	1,362
Japan	11.5	874	12.2	843
Germany	11.7	889	10.7	740

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Information Sources Used to Plan Trip by Those Using Rental Cars

Information Sources Used (multiple response: top 4 of 12)	2008 (Percent)	2009 (Percent)	Point Change (2)
Personal Computer	48	50	1.3
Travel Agency	35	35	-0.3
Airlines Directly	23	25	2.3
Friends/Relatives	14	17	2.1

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2008 (Percent)	2009 (Percent)	Point Change (2)
Leisure/Rec./Holidays	57	61	3.4
Business/Professional	24	21	-3.2
Visit Friends/Relatives	13	13	-0.3
Convention/Conference	4	3	-0.5

All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2008 (Percent)	2009 (Percent)	Point Change (2)
Leisure/Rec./Holidays	71	73	1.7
Visit Friends/Relatives	29	28	-0.7
Business/Professional	27	24	-3.5
Convention/Conference	6	5	-0.4
NET PURPOSES OF TRIP:			
Leisure & VFR	81	83	2.0
Business & Convention	31	27	-3.8

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Transportation Used in United States by Those Using Rental Cars

Transportation Types Used in United States (multiple response--top 5 of 8)	2008 (Percent)	2009 (Percent)	Point Change (2)
Rented Auto	100	100	0.0
Airlines in U.S.	28	28	-0.3
Taxi/Cab/Limousine	27	27	-0.5
City Subway/Tram/Bus	19	19	-0.1
Company or Private Auto	8	8	-0.4

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2008 (Percent)	2009 (Percent)	Point Change (2)
Shopping	88	90	1.8
Dining in Restaurants	88	85	-2.3
Sightseeing in Cities	40	42	2.4
Visit Historical Places	36	38	2.1
Amusement/Theme Parks	38	37	-0.4
Visit Small Towns	34	34	0.4
Water Sports/Sunbathing	29	29	0.2
Visit National Parks	27	28	1.0
Touring Countryside	28	28	-0.7
Cultural Heritage Sites	24	24	0.1



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U.S. Destinations Visited by Overseas Travelers Using Rental Cars

Visitation to U.S. Destinations/Regions (3)	Market Share 2008 (Percent)	Volume 2008 (000)	Market Share 2009 (Percent)	Volume 2009 (000)
REGIONS				
South Atlantic	42.8	3,254	46.0	3,180
Pacific	30.6	2,326	27.3	1,887
Middle Atlantic	25.0	1,901	27.1	1,873
Mountain	17.9	1,361	15.0	1,037
New England	7.3	555	8.1	560
East North Central	8.8	669	7.9	546
West South Central	5.3	403	5.0	346
STATES				
Florida	33.3	2,531	36.1	2,496
California	28.8	2,189	25.9	1,790
New York	21.0	1,596	22.7	1,569
Nevada	13.0	988	11.7	809
Massachusetts	5.9	449	6.4	442
Illinois	**	**	5.3	366
CITIES				
New York City	19.9	1,513	21.9	1,514
Orlando	20.0	1,520	19.3	1,334
Miami	14.2	1,079	17.7	1,224
Los Angeles	15.9	1,209	15.3	1,058
San Francisco	15.4	1,171	12.7	878
Las Vegas	12.5	950	11.3	781
Washington, D.C.	5.9	449	6.2	429
Boston	5.3	403	5.7	394

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Select Traveler Characteristics of Those Using Rental Cars

Traveler Characteristics	2008	2009	Change (2)
Advance Trip Decision Time (mean days)	103	99	-3.8 days
Advance Trip Decision Time (median days)	60	60	0.0 days
Prepaid Package	14%	14%	-0.3 pts.
First International Trip to the U.S.	18%	19%	1.4 pts.
Length of Stay in U.S. (mean nights)	16.3	16.3	0.0 nights
Length of Stay in U.S. (median nights)	12	12	0 nights
Number of States Visited (% 1 state)	58%	59%	1.3 pts.
Average Number of States Visited	1.8	1.8	0.0 states
Hotel/Motel (% 1+ nights)	86%	87%	0.9 pts.
Average # of Nights in Hotel/Motel	10.0	9.4	-0.6 nights
Travel Party Size (mean # of persons)	1.8	1.8	0.0
Gender: % Male (among adults)	67%	63%	-4.1 pts.
Household Income (mean average)	\$110,600	\$100,600	-\$10,000
Household Income (median average)	\$101,400	\$90,800	-\$10,600
Average Age: Female	40	40	-0.1 years
Average Age: Male	44	43	-0.9 years

(1) Overseas includes all countries except Canada and Mexico.

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: <http://tinnet.ita.doc.gov/research/programs/ifs/index.html>.

U.K. includes residents of England, Scotland, Wales, and Northern Ireland.

For a list of the states that comprise each census region, please visit: http://tinnet.ita.doc.gov/outreachpages/census_regions.html.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries.

Publication Date: May 2010

Survey of International Air Travelers

The Survey of International Air Travelers provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the overseas traveler who used rental cars while in the United States.

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Interested in obtaining data for your organization?

OTTI collects, analyzes and disseminates international travel and tourism statistics from the U.S. Travel and Tourism Statistical System and produces visitation data tables, including a business and pleasure arrivals rate of change analysis and detailed region, country and port analyses.

To learn more, you are encouraged to visit:

<http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

For OTTI programs of interest visit:

<http://www.tinet.ita.doc.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (I-92)
- Canadian Statistics
- Survey of International Air Travelers (SIAT)
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts
- Travel Trade Barometer

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